

Constl Ltd

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**WELCOME TO CONSLT**



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# WELCOME

Thanks for joining Conslt, the application that will make it easy for you to acquire new customers, do your job and get paid!

## WHAT IS CONSLT?

Conslt is an all-in-one solution that makes it easy to work with clients remotely. It allows you to:

- **Acquire new customers**, thanks to its searchable professional directory.
- **Do your job**, through the use of **video calls**, text and file **messaging** and **additional tools** such as forms and to-dos.
- **Get paid!** You set your own fee for each session. Conslt makes it really easy for clients to pay using credit/debit cards or Apple Pay. The money is transferred directly to your bank account.

## SO, WHAT'S THE DEAL?

Conslt is free to download and use for both professionals and clients. It is free for professionals to list their profiles in the public directory and advertise free taster sessions.

When you charge for a session to a client that we bring you, Conslt takes a 10% cut from the transaction. For example, if you invite a client for a £100 session, the client pays £100 and you receive £90. This fee is all inclusive and covers the use of the app, your listing in the directory, the video conferencing costs and the credit card processing fees.

## What if I bring my own clients?

Conslt only charges its 10% fee for clients that it brings to you. For the first professionals that sign up and get their own clients to join Conslt, they can work with them and keep 100% of their fee.



## HOW DO I GET HELP?

We're here to help at any time. If you have any difficulties or something isn't quite right, please let us know at [support@constl.co.uk](mailto:support@constl.co.uk) or chat with support directly within the app (you'll need to have registered first).

## HOW DO I INSTALL THE APP?

The app is available for iOS. Search for **Constl** on the **App Store** or simply go to <http://appstore.com/constl> .

## HOW DOES THE APP WORK?

Currently, Constl is available on iPhone. You'll find it is very easy to use as it works like many apps that you're already familiar with.

The application has 4 sections:

- **Directory**, where you can list your public profile.
- **Messages**, where you can interact with your clients.
- **Tasks**, which is used by clients only and shows their future appointments, and un-completed to-dos and forms.
- **Calendar**, which is only present for professionals. It shows all your scheduled appointments.

## HOW DO I REGISTER?

- Tap on the **profile icon** on the top right of the main screen.
- Choose **Register**, and follow the instructions.



## HOW DO I SETUP MY PROFESSIONAL PROFILE?

You will need to write a few short paragraphs about yourself and the services you provide. It might be easier to write these in an email and send it to your phone.

- Tap on the **profile icon** on the top right of the main screen.
- Select **Become a provider**.
- **Accept** the terms and conditions.
- Tap **Professional profile**, then **Profession** and select the appropriate one.
- Select your specialities, just under the **Profession**. You can select more than one. If your speciality isn't listed, please contact us at support@constl.co.uk
- In **About me**, enter a few short paragraphs about yourself and the services you provide. If you've emailed the content to yourself, you can copy and paste it in there.
- In **Fees**, explain how much you charge for your services.
- Tap **Save** at the top right of the screen.
- You can now enable your public profile but turning on the **Activate profile** switch.
- Tap **Close** on the top right of the window to come back to the main screen.

Your profile will then appear in the directory under the profession you've chosen. It may take a few seconds for your profile to appear. Clients that find your profile interesting will be able to message you.

## HOW DO I ADD A PHOTO TO MY PROFILE?

- Tap on the **profile icon** on the top right of the main screen.
- Tap on the **camera icon** and you'll be able to take a new picture or choose an existing picture.

## HOW CAN I ACCEPT PAYMENTS?

- Tap on the **profile icon** on the top right of the main screen.
- Fill in all the relevant information in the **Identity** section. This information is required by our credit card payment provider.
- Add your bank account details in the **Get paid** section.

When clients pay for a consultation, it will take about 7 days for the funds to reach your account. It may take 10 days for the first payment.



## HOW DO I INVITE MY EXISTING CLIENTS?

It is very simple to invite your existing clients to Conslt.

- Go to the **Messages** section.
- Tap on **Invite users**.
- Select your method for sharing the invite.

When your client registers successfully with the referral code indicated in the message, you will receive a confirmation message and you will automatically be connected: you will appear in each other's **Messages** section. Take this opportunity to send a welcome message to your client.

## HOW DO I SETUP TASTER SESSION?

When you want to be reached by new customers, just schedule free taster session that anyone can book. It will give you an opportunity to establish a first contact, explain how you work and schedule further paid sessions.

- Go to the **Calendar** section.
- Select a day where you have some free time.
- Tap on **Add Free Session** and choose a time and a duration.
- Tap **Save** on the top right of the screen.

You can schedule as many taster sessions as you wish. This is the best way to find new customers. They need not be a full length session, you decide how long they should be.

As soon as a potential client books a free session, you'll receive an alert and you will be able to reply in the messages section. We recommend you send a welcome/thank-you message. You can also use the messaging capabilities to ask questions in preparation for the video consultation.

You can cancel any booking if you feel it isn't appropriate. Please message the client before doing so.



## HOW DO I MESSAGE A CLIENT?

Constl's messaging system works in a similar way to iMessage or WhatsApp.

- Go to the **Messages** section. All your clients appear here.
- Select the client.
- Type a message in the zone at the bottom of the screen and tap on the **send icon**, next to the text.

## HOW DO I SCHEDULE A VIDEO SESSION WITH A CLIENT?

- Go to the **Messages** section and select a client.
- Tap on the **paperclip icon** at the bottom right of the screen.
- Choose **Appointment**.
- Enter a **time**, **duration** and **cost**.
- Tap **Send** on the top right of the screen.

Be aware your client will be required to pay for the session in order to accept it, so make sure you've agreed the cost and times before sending an invite.

Your appointment will be added to the **Calendar** session of the app and you can check if the session has been paid and accepted.

You will receive a message and email when the session has been paid and accepted by the client.

## HOW DO I CANCEL A SCHEDULED VIDEO SESSION?

- Go to the **Calendar** section and find your appointment.
- Swipe left on the appointment and choose **Cancel**.

If a payment has been made, the money will be refunded to the client. Make sure you message the client before cancelling a session.

## HOW DO I ESTABLISH A VIDEO CALL WITH A CLIENT?

You first need to have scheduled an appointment and the client needs to have accepted it.

- Make sure you're on WIFI or a good connection.
- Go to the **Calendar** section and find the appointment
- Tap on the **Call** button.
- During the call, you can view the user's messages and tasks by tapping on the **Info** button at the top right of the screen.
- When the call is finished, simply tap on the **Close** button.

Note that only you can call the client. The client isn't able to call you. If you are disconnected during the call, simply close the window and call again.

As with any phone call, if the client's phone is on silent, it will not ring but will only vibrate.

## HOW DO I SEND A PHOTO TO A CLIENT?

Sometime an image is worth a thousand words.

- Go to the **Messages** section and select a client.
- Tap on the **paperclip icon** at the bottom right of the screen.
- Choose **Photo**.

You'll be able to take a new photo or choose an existing photo in your photo library or film roll.

## HOW DO I SEND A FILE TO A CLIENT?

- Go to the **Messages** section and select a client.
- Tap on the **paperclip icon** at the bottom right of the screen.
- Choose **Document**.

You will see a document chooser.

- Tap on **Location** at the top right to select the source of your document, such as **iDisk** or **DropBox**.
- Select a document of your choice and tap **Send** at the top right of the screen.



## HOW DO I SEND A TO-DO (A TASK) TO A CLIENT?

Conslt allows you to send tasks to your clients and monitor their completions.

- Go to the **Messages** section and select a client.
- Tap on the **paperclip icon** at the bottom right of the screen.
- Choose **To-do**.
- Enter text describing the task to accomplish.
- Press **Send** on the top right of the screen.

You'll receive an alert when your client marks the to-do as completed.

## HOW DO I SEND A FORM (CONTRACT, SURVEY, EXERCISE...) TO A CLIENT?

It is often necessary to communicate with your client in a more structured way. Conslt allows you to create a library forms which contain text and questions. You can then send these forms to your clients and they will have the ability to easily fill them in and send them back to you.

Forms are very flexible. You can create a contract which will contain text and a single yes/no question (such as "Do you agree to this contract?"), surveys to collect feedback from your client or exercises in order to mark the answers.

You will receive an alert when your client has filled-in a form that you've sent.

- Go to the **Messages** section and select a client.
- Tap on the **paperclip icon** at the bottom right of the screen.
- Choose **Form**.
- Select an existing form or create a new one.
- Tap **Send**.



## Creating a form

A form is a succession of titles, text, or questions. Save your form when finished and you can select it and send it. You'll be able to send it again to the same or any other client without having to recreate it.

- Tap on **Add form**.
- Enter a name for your form
- Tap on **Add section**.
- Choose the type of section, configure it and save the session.
- Add as many section as you like.
- You can delete sections by swiping right.
- Tap **Save** when you're done.

To delete or edit a form, swipe left on the form's row.

## HOW DO I CHECK COMPLETION OF TO-DOS AND FORMS?

You will receive an alert and a message each time a client completes a to-do or a form. You can view the answers directly from the message list, however it is also possible to see, in a single place, the completion status of both to-dos and forms for a client, so you can monitor that client's progress.

- Go to the **Messages** section and select a client.
- Select **Tasks** at the top right of the message list.
- Tap on a completed form to see your client's answers.

## I STILL HAVE A QUESTION OR A SUGGESTION!

Get in touch at [support@constl.co.uk](mailto:support@constl.co.uk) or message support directly within the app (you'll need to have registered first).

## THANKS!

Thanks again for joining **Constl**. We can't wait to hear from you.

